COSA PRIME*Link* Internal User Guide

Capital Improvements Management Services

August 2012

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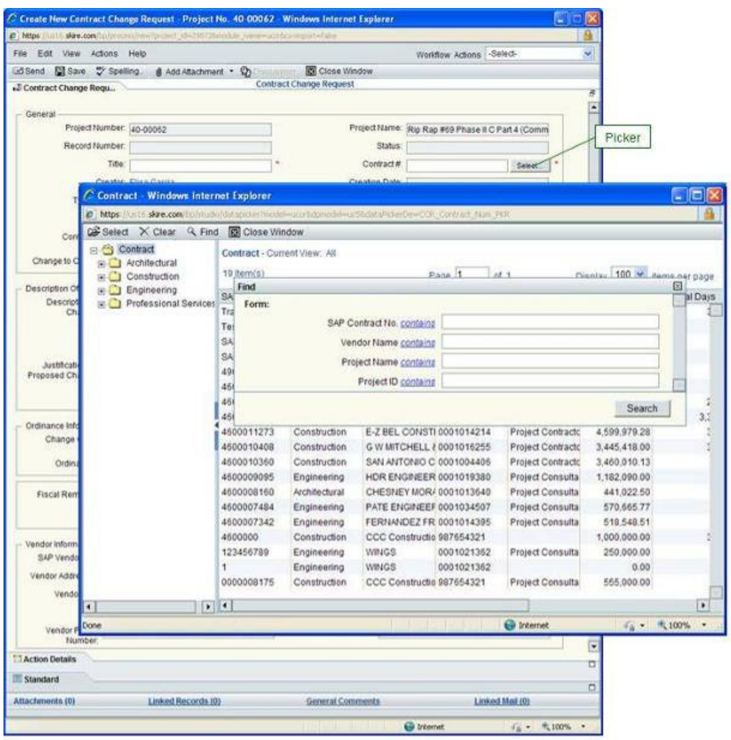
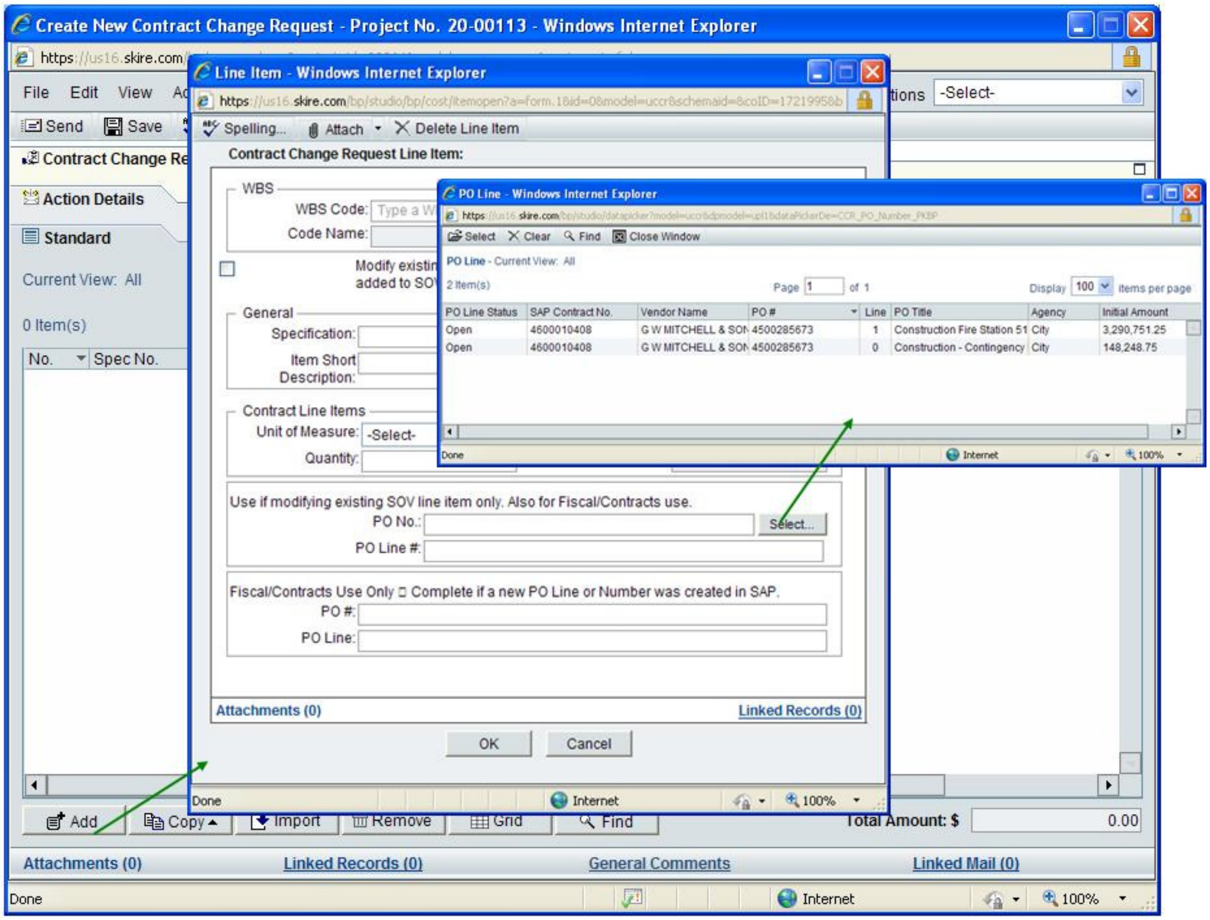
Submit a Contract Change Request

NOTE: Contract Changes replace amendments, change orders and task orders within the projects

1. Go to your project
2. Select Collaboration
3. Select Task
4. Select New ➔ Contract Change Request
5. Complete fields as desired
   - White background text boxes - editable fields
   - Fields with a red * - required fields
   - Blue-gray text box - read-only
   - Pickers - select from a list of options or a dialog box will appear with a selection
     - Click on Select
     - Click on Find



6. Select an action from the Workflow Action list on the upper right hand corner
7. Select the Lower Form (Standard)
8. Click on Add

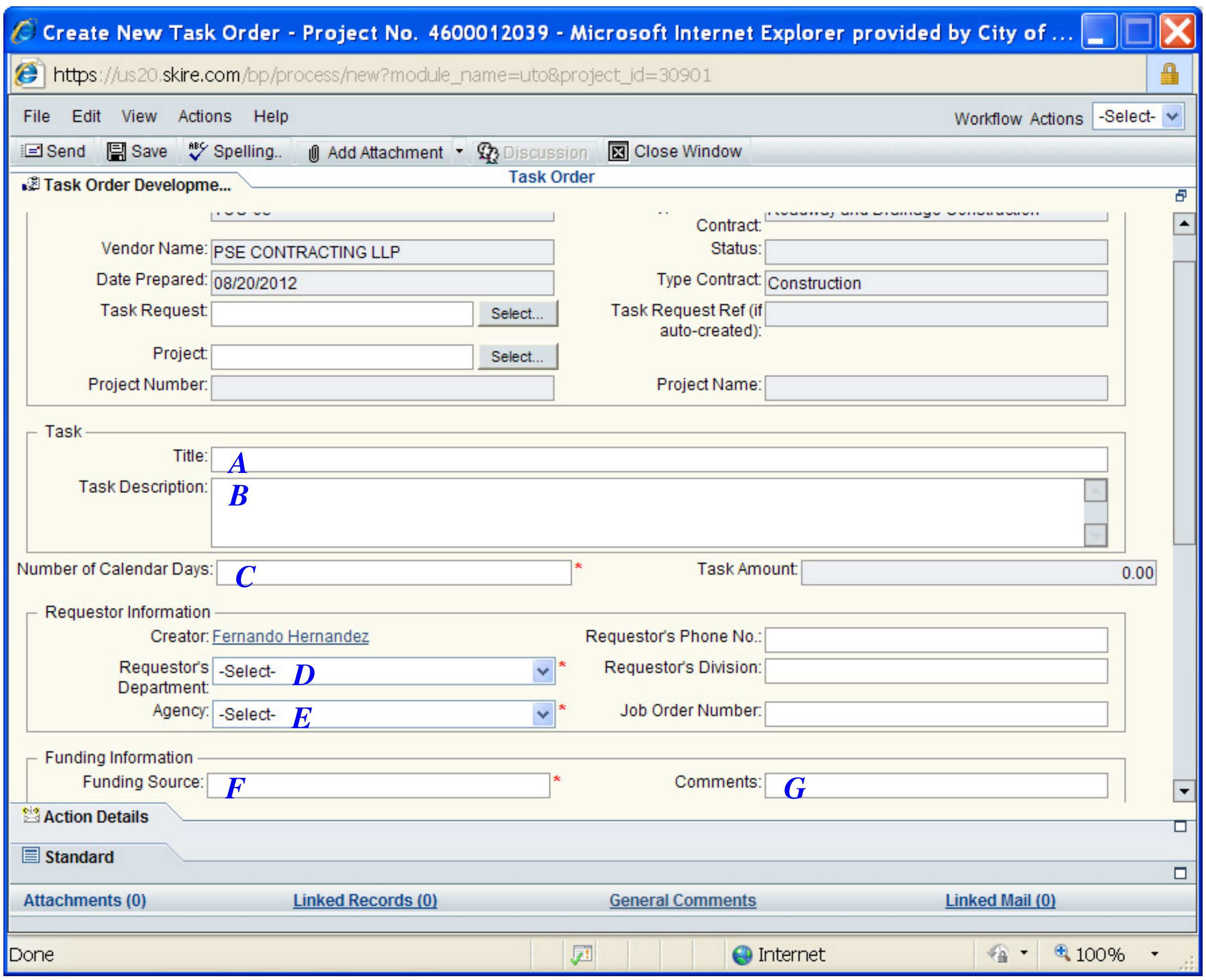


9. Fill in the necessary fields
10. Click Ok
11. Then press Send
    - You will see a dialog box stating the contract change request has been submitted successfully

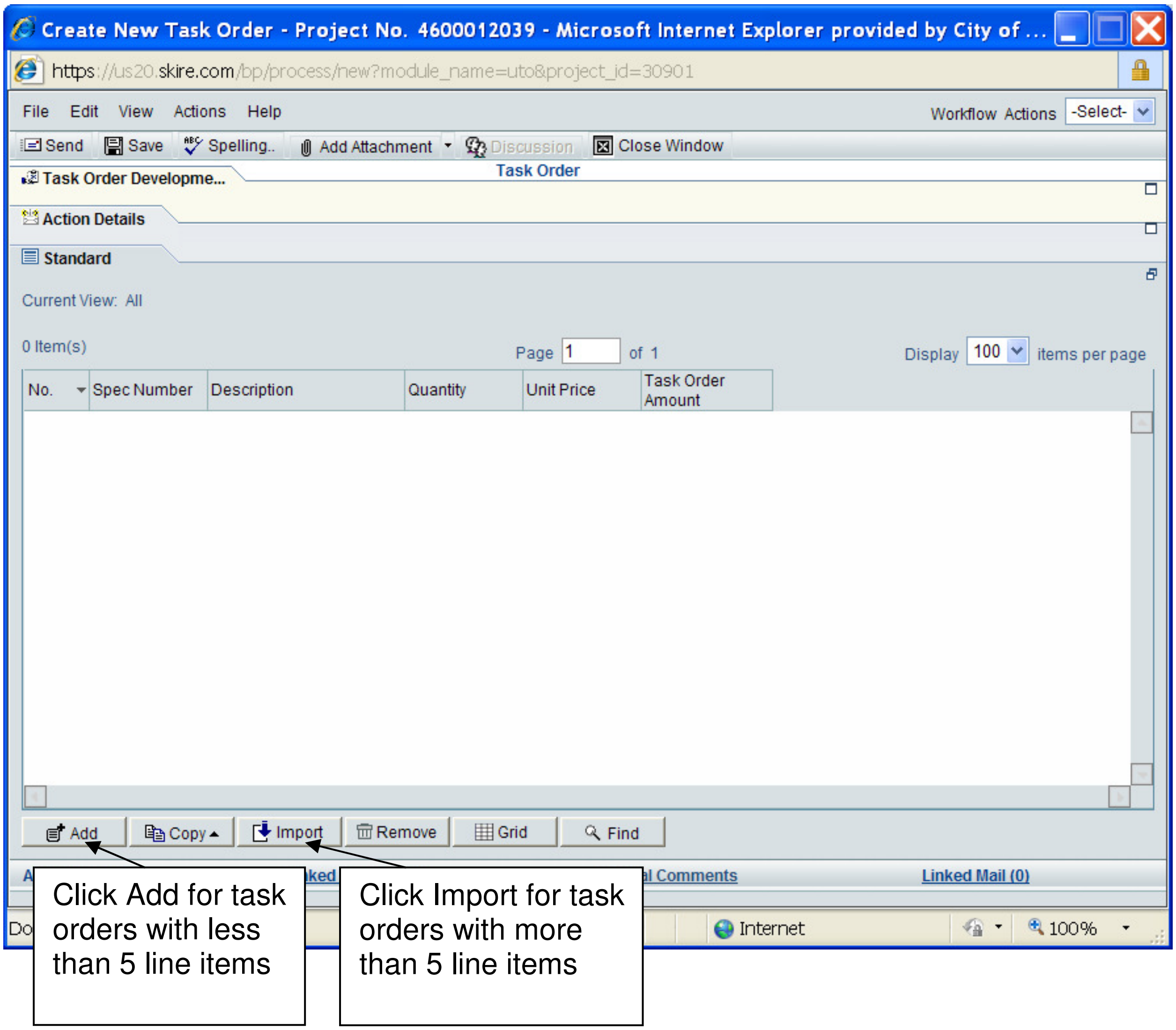
Submit a Task Order

1. Go to your on-call contract
2. Select Collaboration
3. Select Task
4. Select New ➔ Task Order
5. Complete fields as desired:
    a. Title
    b. Task Description
    c. Number of Calendar Days
    d. Requestor's Department
    e. Agency
    f. Funding Source
    g. Comments

Note:
White background text boxes - editable fields
Fields with a red * - required fields
Blue-gray text box - read-only
Pickers - select from a list of options or a dialog box will appear with a selection



6. In the Standard tab, click Add or Import to enter line items. To import line items, refer to *Procedures for Importing Task Order Line Items* how-to guide
7. Click Add Attachment ➔ My Computer to add an attachment
8. Select an action from the Workflow Action list on the upper right hand corner
9. Click Send

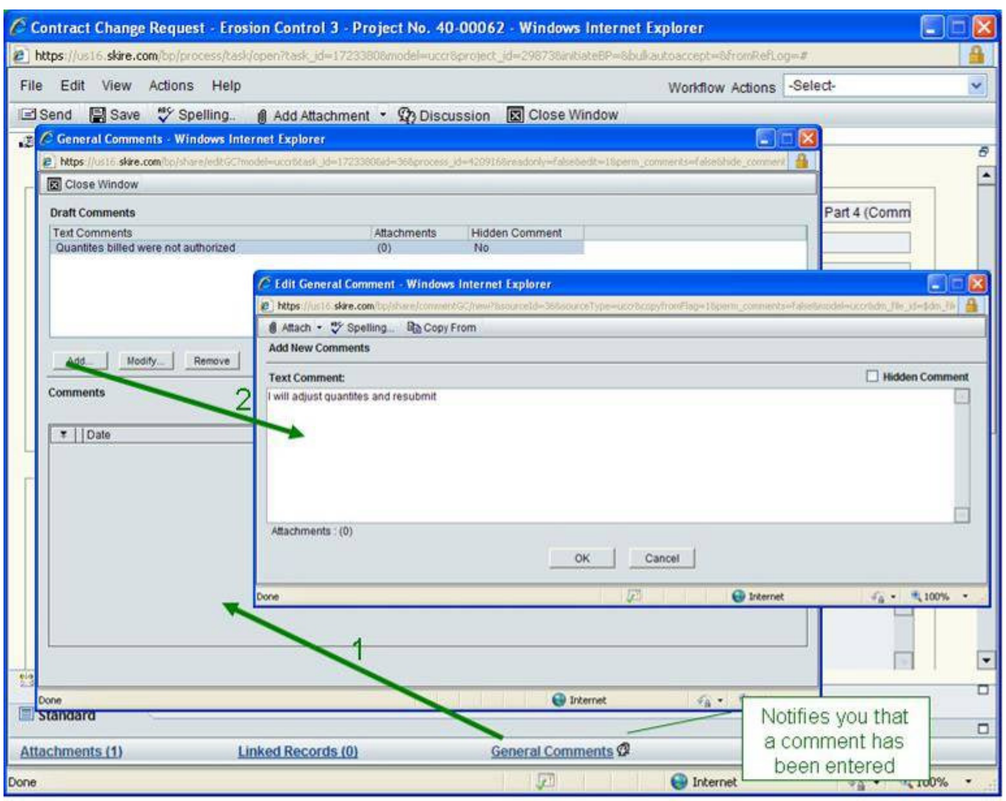


Approve a Task

1. Go to your project Dashboard
2. Under Items Requiring Your Attention – Select Tasks
3. Double Click on a task on your list and review the item
4. Click on Accept Task or Decline Task - on the Upper Right hand corner
   - If accepted – Review the file
     - Select an action - Under Workflow Actions
     - Click on Send
   - If declined – you will receive a dialog box stating: your name will be removed from this step for this record. Are you sure you want to decline task?

Reject a Task

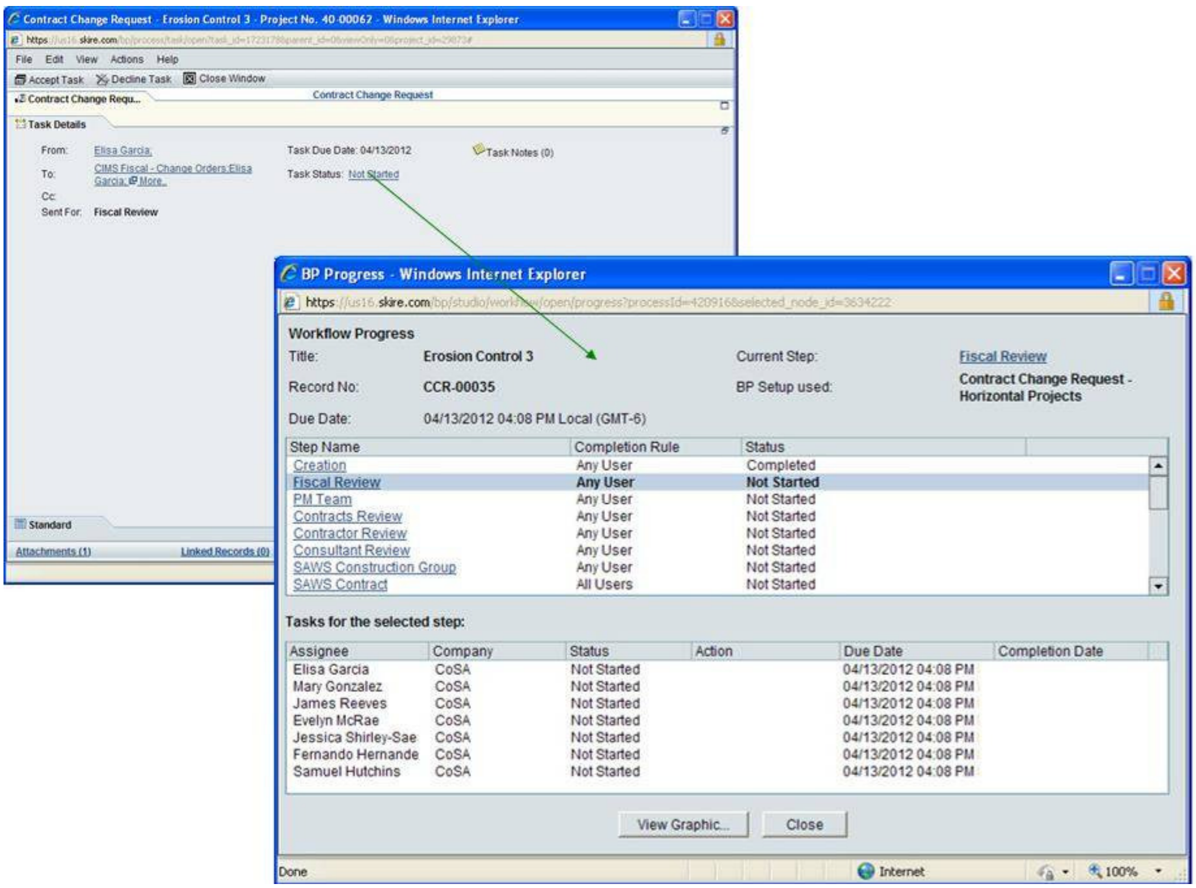
1. Open Task
2. Accept Task
3. On the bottom of the screen Click on General Comments
4. Click on Add
5. Type in Reason
6. Click ok
7. Click Close Window
8. Select and Action
9. Click on Send



Check Contract Change Request

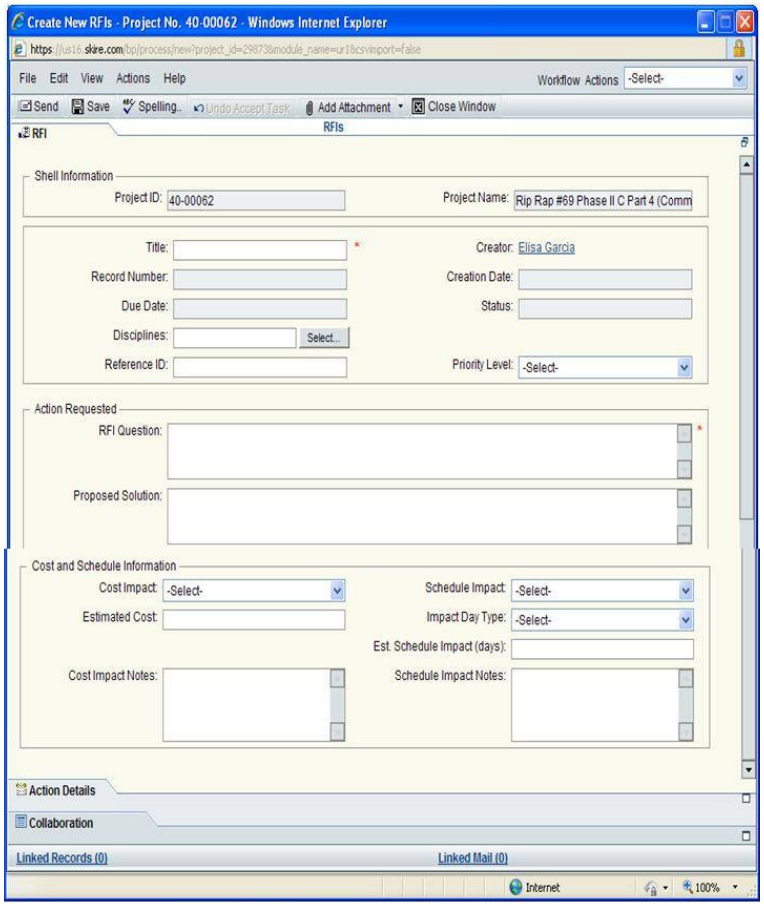
1. Go To Collaboration
2. Select Tasks
3. On the right side – Select the Change Request you are inquiring
4. Select the from Fiscal Review
5. Select the link next to Task Status
6. You will see the workflow process
    - If you click on view Graphic you will see the workflow

Note: If you click on the menu bar / view - you can see the audit log



Creating a Request for Information (RFI)

1. Click Collaboration
2. Tasks
3. New
4. Select RFI



1. Complete the Upper form
2. Select Workflow Action on the Upper right
3. Add Attachments, if needed
4. Complete Lower form - Collaboration
5. Go to Middle form – Action detail
6. Select whom to CC
7. Click Add
8. Click OK
9. Click Send

Notification of RFI sent

RFI Response

You will receive an email that an RFI requires your review and it will contain a link

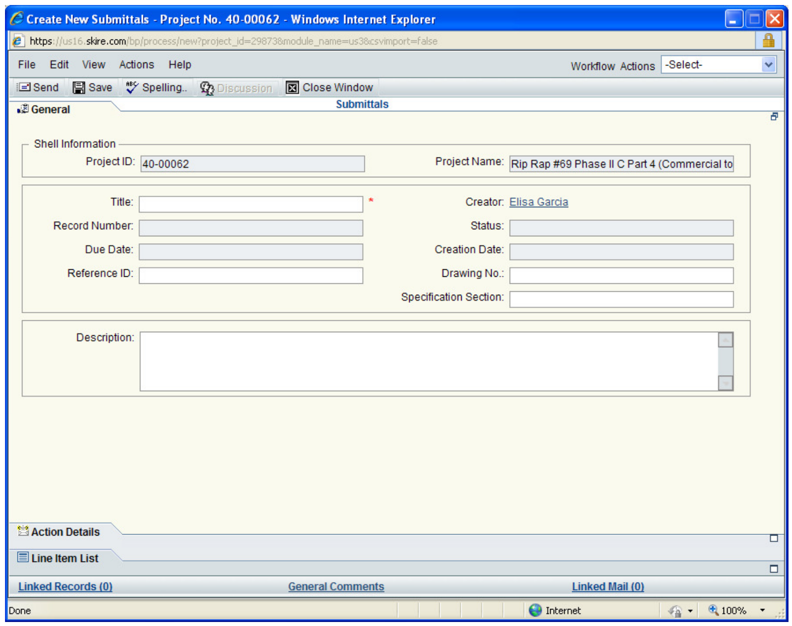
1. Click on the link and it will open up the RFI
2. Click on Accept Task
3. Open the Upper Form (RFI)
4. Select collaboration to provide your comments
5. Scroll to the bottom and Type in your Approved Response
    - Only if you are the consultant or PM team and you are providing the final response.
6. Select a Workflow Action
7. Click on Send

Creating a Submittal

1. Click Collaboration
2. Tasks
3. New
4. Select Submittals

1. Complete the Upper form
2. Select Workflow Action on the Upper right
3. Complete Lower form – Line Item List
4. Go to Middle form – Action detail
5. Select whom to CC
6. Click Add
7. Click OK
8. Click Send

Notification of Submittal sent



Submittal Response

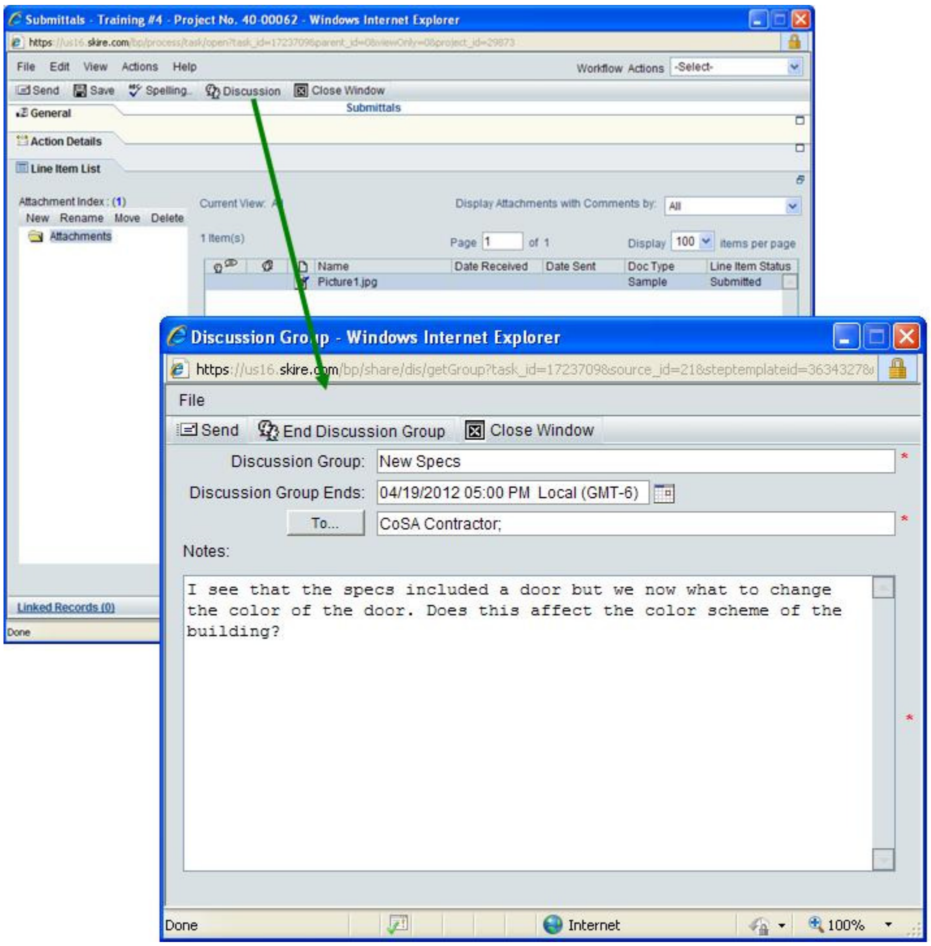
You will receive an email that a submittal requires your review and it will contain a link

1. Click on the link and it will open up the submittal
2. Click on Accept Task
3. Open the Upper Form and review information
4. Open the lower form (Line Item List)
5. Open the Attachment
6. Under the field: Line Item Status you are able to provide status
7. Select a Workflow Action
8. Click on Send

Create a Discussion

Discussion can be used to ask a question on an item or to get further clarification.

Click on Discussion



Meeting Minutes

1. Click Collaboration
2. Tasks
3. New
4. Select Meeting Minutes
5. Complete fields as desired
6. Select a Workflow Action
7. Select Action Line Items
    - Click on Add
    - Complete fields as desired
8. Click Ok
9. Click Send

Permits

1. Click Collaboration
2. Tasks
3. New
4. Select Permits
5. Complete fields as desired
6. Click on Finish Editing

Cost Sheets

1. Select Cost manager
2. Select Cost Sheet
3. Double Click on the Cost Sheet listed on right side
4. Everything is listed by WBS #
    - Under the File menu you are able to export a Summary Cost Sheet, Summary Budget, WBS Details and Column Details

Project Information

1. Select Information
2. Select General
3. Double Click on the Project Information on right side
4. Complete fields as desired under Project Information
5. Under the Standard form you are able to enter major points of the project or key issues